

What is claimed is:

1.

A first ever scaleable system for enterprise wide client interaction management across a plurality of business units comprising:

an enterprise wide database, the database containing shared client interaction information and client interaction information specific to at least one of the business units;

a contact center application capable of accessing the database and causing client interaction information to be displayed; and

a support application capable of accessing the database, creating default configuration for each business unit, and creating information restrictions for each business unit.

2.

The scalable system for enterprise wide client interaction management of claim 1 wherein one or more of the business units is selected from the set comprising an insurance unit, a financial unit, a retirement planning unit, a distribution unit, a mortgage unit, a pension unit, and a banking unit.

3.

The scalable system for enterprise wide client interaction management of Claim 1 wherein the contact center application is written in JAVA.

4.

The scalable system for enterprise wide client interaction management of Claim 1 wherein the contact center application is written in POWERBUILDER.

5.

The scalable system for enterprise wide client interaction management of claim 1 wherein the support application is written in JAVA.

6.

The scalable system for enterprise wide client interaction management of claim 1 wherein the support application is written in POWERBUILDER.

7.

A new method of restriction based customer interaction management between a customer and a customer representative comprising:

initializing a customer interaction;

retrieving information related to the customer; and

restricting the representative's ability to access a first customer information field based on a second customer information field.

8.

The method of restriction based customer interaction management of claim 7 wherein the second customer information field contains a state.

9.

The method of restriction based customer interaction management of claim 7 wherein the second customer information field contains a marital status.

10.

The method of restriction based customer interaction management of claim 7 wherein the second customer information field contains a language.

11.

The method of restriction based customer interaction management of claim 7 wherein the step of initializing a customer interaction is selected from the set comprising receiving a phone call from a customer, calling a customer, receiving a facsimile from a customer, sending a facsimile to a customer, receiving an electronic message from a customer, sending an electronic message to a customer and visiting personally with a customer.

12.

A method of restricting unauthorized transactions by persons unlicensed to make transactions within a particular political subdivision to customers within the political subdivision using a computer system comprising:  
receiving information concerning the customer's political subdivision;  
receiving information concerning the broker/dealer's licensing for the customer's political subdivision;  
selectively enabling data fields based on the customer's political subdivision and the broker/dealer's licensing.

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13.

A first ever system for enterprise wide client interaction management across a plurality of business units comprising:

a computing device including a digital storage medium and a central processing unit;

an enterprise wide database, the data base containing shared client interaction information and client interaction information specific to at least one of the business units;

a contact center software application in the digital storage medium and executed by the computing device for accessing the database and causing client interaction information to be displayed; and

a support software application in the digital storage medium and executed by the computing device for accessing the database, creating default configurations for each business unit, and creating information restrictions for each business unit.

14.

The system for enterprise wide client interaction management of claim 13 wherein the business units includes one or more of the business units selected from the set comprising an insurance unit, a financial unit, a retirement planning unit, a banking unit, a pension planning unit, and a mortgage unit.

15.

The contact center software application of claim 13 wherein the contact center software application is a JAVA application.

16.

The system for enterprise wide client interaction management of claim 13 wherein the support software application is a JAVA application.

17.

A software article for use in interacting between a contact center and a customer, the software article comprising:

a computer readable signal bearing medium;

means in the medium for executing software for interacting

between the contact center personnel and the client;

means in the medium for creating a user interface for the

software, the user interface having objects that

comprise a tree structure for displaying account

information in hierarchical form; and

means in the medium for creating a user interface for the

software the user interface having the capability of

enabling and disabling information topics within the

hierarchical form; and

means in the medium for allowing a user to navigate the tree

structure in the user interface to display information

related to an enabled topic.

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